ClientEngage Design Note

Design Note v1.0.1 User Manual

Thank You

Thank you for choosing ClientEngage Design Note. This guide will provide you with a one-stop support document that helps you make your first steps with ClientEngage Design Note.

This manual will guide you through the installation process and provide you with an overview of the core functionalities of ClientEngage Design Note.

About ClientEngage Design Note

Do you design stuff for your clients? Then ClientEngage Design Note will be your best friend when getting feedback from your clients on your designs. A simple and intuitive interface enables you to upload your graphics to be annotated by your clients.

A link takes your clients to the graphic's feedback-page (optionally password protected), where they can annotate your designs by simply clicking on them and leaving their feedback. Your clients love the cute kitten picture on the packaging you designed for them? They will click it and leave their free-word comment alongside it.

After submitting their feedback, they will be taken to a discussion page, where you and your clients can have an in-depth chat about your design. Got more than one design? No problem, just give them the access code of a collection!

Moreover, administrators can access all submitted feedback and can opt-in to receive automatic activity notifications: you will always be kept up-to-date on anything that goes on.

www.ClientEngage.com

Do you like ClientEngage Design Note? Then please rate this item on CodeCanyon.

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1. About ClientEngage Visitor Chat

Do you design stuff for your clients? Then ClientEngage Design Note will be your best friend when getting feedback from your clients on your designs. A simple and intuitive interface enables you to upload your graphics to be annotated by your clients.

A link takes your clients to the graphic's feedback-page (optionally password protected), where they can annotate your designs by simply clicking on them and leaving their feedback. Your clients love the cute kitten picture on the packaging you designed for them? They will click it and leave their free-word comment alongside it.

After submitting their feedback, they will be taken to a discussion page, where you and your clients can have an in-depth chat about your design. Got more than one design? No problem, just give them the access code of a collection!

Moreover, administrators can access all submitted feedback and can opt-in to receive automatic activity notifications: you will always be kept up-to-date on anything that goes on.

With ClientEngage Design Note you will get to the heart of what your visitors/clients think.

1.1. PHP Design Feedback Engine: Functionality Overview

Fully-Featured Chat for your Website

- Send your clients direct-access links to their design-projects
- Clients can use the image/design annotation engine to provide constructive feedback for you
- View feedback as "clicks" on your designs
- Secure your designs by setting access codes
- Group designs into collections if you need feedback on different versions

Absolute Flexibility

- Unlimited number of administrators
- Unlimited number of collections, items, feedbacks and discussions
- Fully translatable through PO files: comes with English and German translations out-of-the-box

Activity Notifications

- A notification system lets you know if there are any new client interactions
- Optionally receive these notifications as emails so you never miss your clients' feedback

Additional Discussion & File-Sharing Feature

- Start a 1-on-1 conversation with your clients and show them you are keen on their views
- A fully-featured discussion engine for you and your clients is included too
- Your clients can share files with you through the discussion feature
- A notification system lets you know if there are any new client interactions

Easy Integration & Use

- Automated installation script – no extensive knowledge of PHP/MySQL necessary
- Detailed handbook with installation & use instructions
- Extensible: the system is developed with the CakePHP MVC framework and features a clean architecture. This means that, if you have web-development experience, the system is easily extensible

2. System Requirements

In order to be able to use ClientEngage Visitor Chat, you must fulfil the following system requirements:

- Apache 2 HTTP Server
- Preferably with mod_rewrite enabled
- PHP with a version of greater than PHP 5.2.8
- GD library for image manipulation
- MySQL with a version of greater than MySQL 5 (i.e. with InnoDB support)
- Preferably a subdomain/domain for use with ClientEngage Visitor Chat
- Safe mode: off
- Enough server-resources for the number of concurrent chatters you expect
- Finally, the PHP PDO extensions have to be installed (PDO & PDO MySQL)

Furthermore, you have to ensure that the following directories, as well as their subdirectories and the files contained therein, are writable:

- Temporary Directory: app/tmp/
- Configuration Directory: app/Config/
- Upload Directory: app/uploads/

3. Updating from an Earlier Version

3.1. Updating Procedure

If this is your first time installing ClientEngage Visitor Chat, please continue reading on page 6.

If you are updating from an earlier version of ClientEngage Visitor Chat, then please follow the following steps:

1. [**Important**] Create a **full** backup of your system-files **and** database
2. Upload the contents of the directory "ClientEngage UPDATE" on the server into the same directory where you have installed ClientEngage Visitor Chat; do **not** use the "ClientEngage System" directory
3. Overwrite all files and folders when prompted
4. You have to ensure that the following directories, **as well as subdirectories and all files and directories contained therein**, are writable:
   - Temporary Directory: app/tmp/*
   - Configuration Directory: app/Config/*
5. Point your browser to the URL of your ClientEngage Visitor Chat installation
6. Finally, follow the on-screen instructions and perform the one-click update
7. After the installation has finished, you can remove write-permissions from the Config-directory

In the unlikely case that the update progress was unsuccessful, please replace the whole application directory and database with the backup you created.

Furthermore, please note that you will need to merge any custom code back into the system since the ClientEngage Visitor Chat interface as well as codebase will be reset to the current development state. If you wish to keep your own custom translations please refer to section 3.2.

Important: after installing the update, navigate to "Administration → Settings" and configure any new configuration settings. Even if you do not change anything, it is **important** that you click "Save".

3.2. Keeping Your Custom Translation Files

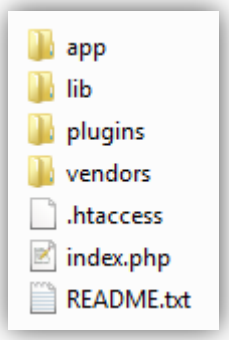
Since you may have added your own custom translations of the ClientEngage Visitor Chat, or you may have adapted the existing translation files, you need to perform the following steps so as to be able to keep your changes:

1. Do **not** overwrite the Locales directory in "app/Locale" with the one in the "ClientEngage UPDATE" directory (you can do this by deleting it from the update directory before moving "ClientEngage UPDATE" to your server)
2. After finalising the update, simply open each of the translation files, such as "app/Locale/deu/LC_MESSAGES/default.po" with Poedit and select "Catalog -> Update from POT file"
3. Next, please select "app/Locale/default.pot"; you can now update any new translation strings that were added since the last version of ClientEngage Visitor Chat

4. Installation

4.1. System Upload

Upload the contents of the directory “ClientEngage System” to your webserver. You should now have the following directory structure on your webserver:



For best results you should run ClientEngage Visitor Chat under a domain or subdomain. If you wish to do this, then you should point (*not* redirect) your domain to the following directory: SERVERDIR/app/webroot/.

If you are using an Apache server, you can accomplish this by setting the “DocumentRoot” directive to the aforementioned directory. If you do not have access to your server’s configuration, your domain management interface should provide you with a setting that allows you to point your domain/subdomain to this directory.

It is recommended to run ClientEngage Visitor Chat from a domain/subdomain pointed to the webroot directory, since this keeps all of the system’s files outside of the document root.

4.2. Setting File/Directory Permissions

You have to ensure that the following directories, **as well as subdirectories and all files and directories contained therein**, are writable:

- Temporary Directory: app/tmp/*
- Configuration Directory: app/Config/*
- Upload Directory: app/uploads/*

After the installation has finished, you can remove write-permissions from the Config-directory.

4.3. Accessing the Automatic Installation Tool

You can now access ClientEngage Visitor Chat by navigating your browser to your ClientEngage Visitor Chat installation, such as: http://designnote.example.com

If you do not encounter any errors, please carry-on reading at 4.4.

If you see an error *and* are using GoDaddy as your webhost, please perform this change on your “app/webroot/.htaccess” file. If you do *not* use GoDaddy and you receive an Internal Server Error, then it is likely that your webserver (mod_rewrite) is not correctly configured. In this case, please use a text-editor (such as Notepad++) to open the following file: app/Config/rewrite-core.php

Next, please change line 16 from this:

```
// Configure::write('App.baseUrl', env('SCRIPT_NAME'));
```

To this:

```
Configure::write('App.baseUrl', env('SCRIPT_NAME'));
```

Finally, please delete the .htaccess files in the following directories:

- ROOT/.htaccess
- ROOT/app/.htaccess
- ROOT/app/webroot/.htaccess

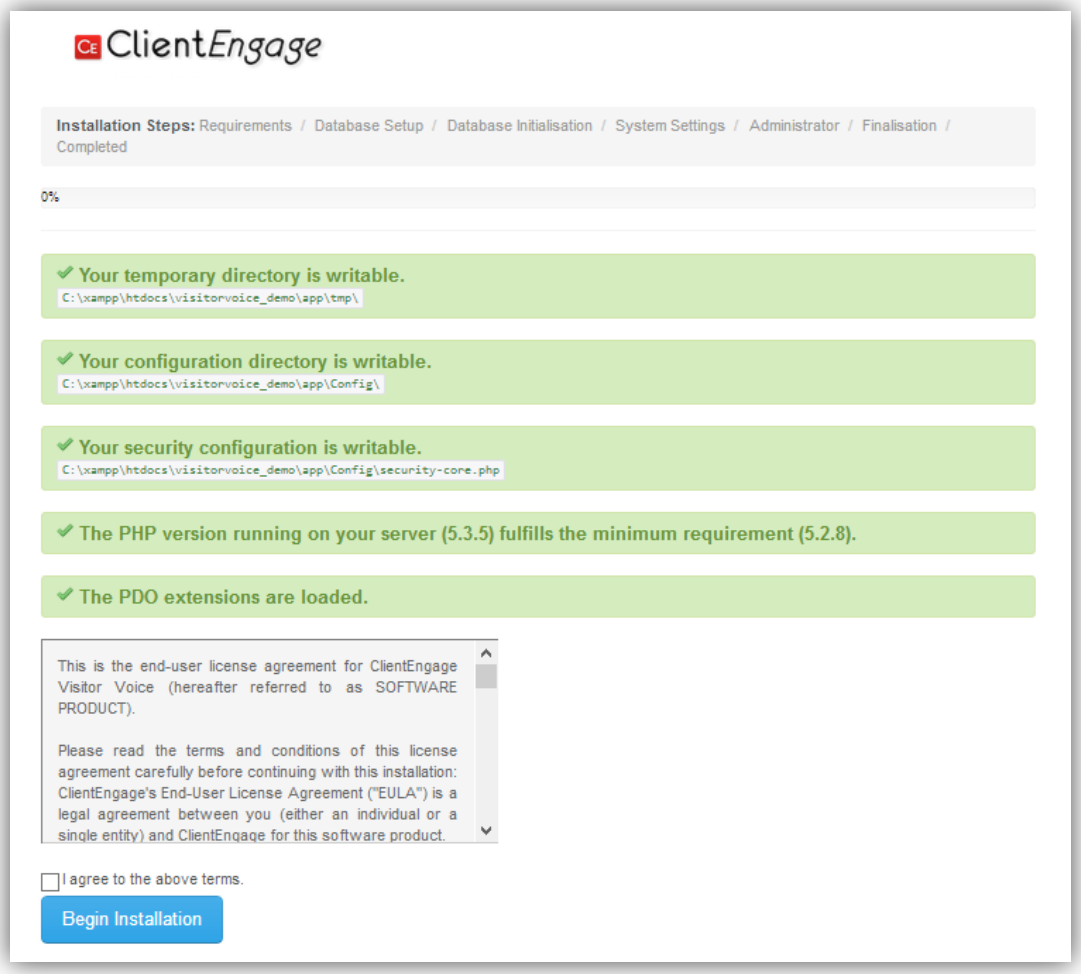
Now, please access the installation tool under the following address: http://designnote.example.com/index.php

If you use this method, your ClientEngage Design Note installation will always be available under the aforementioned address.

4.4. Installation Procedure

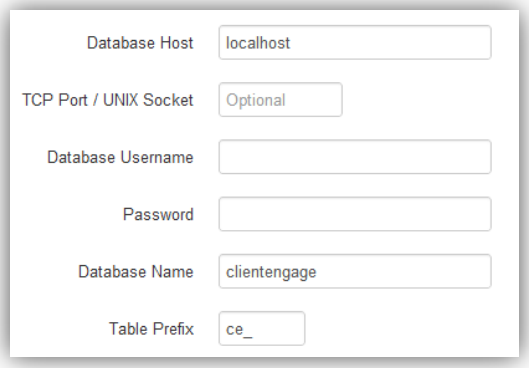
You can now access ClientEngage Visitor Chat by navigating your browser to your ClientEngage Visitor Chat installation, such as: http://designnote.example.com

You should now see the following screen:

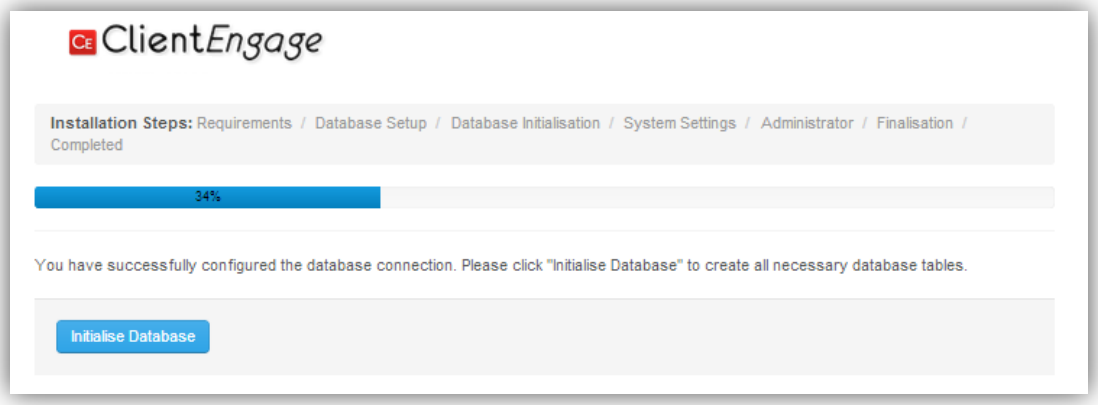

ClientEngage
Installation Steps: Requirements / Database Setup / Database Initialisation / System Settings / Administrator / Finalisation / Completed
0%
Your temporary directory is writable.
C:\xampp\htdocs\visitorvoice_demo\app\tmp\
Your configuration directory is writable.
C:\xampp\htdocs\visitorvoice_demo\app\Config\
Your security configuration is writable.
C:\xampp\htdocs\visitorvoice_demo\app\Config\security-core.php
The PHP version running on your server (5.3.5) fulfills the minimum requirement (5.2.8).
The PDO extensions are loaded.
This is the end-user license agreement for ClientEngage Visitor Voice (hereafter referred to as SOFTWARE PRODUCT).
Please read the terms and conditions of this license agreement carefully before continuing with this installation: ClientEngage's End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity) and ClientEngage for this software product.
I agree to the above terms.
Begin Installation

If your system fulfils the requirements, you can commence the installation process after reading and accepting the end-user license agreement.

In the next screen, please enter your database details (the port is optional). It is important that you create the database before entering your details (Collation: “utf8_unicode_ci”):

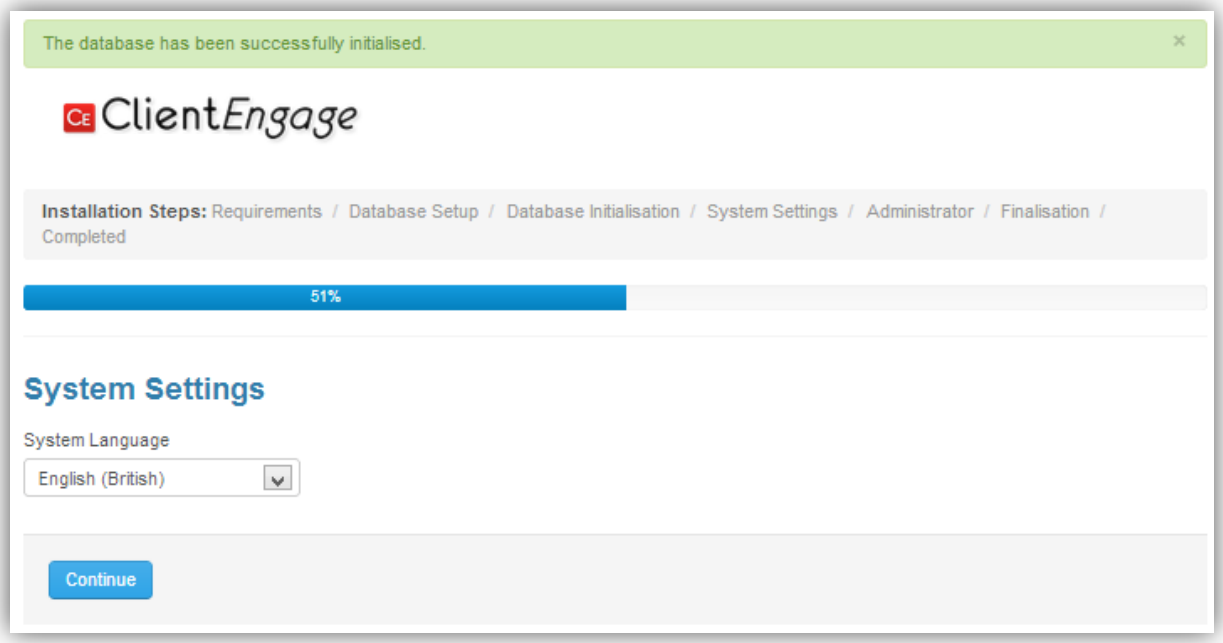


Click “Continue”. If the details you entered are correct, you will see the following screen:

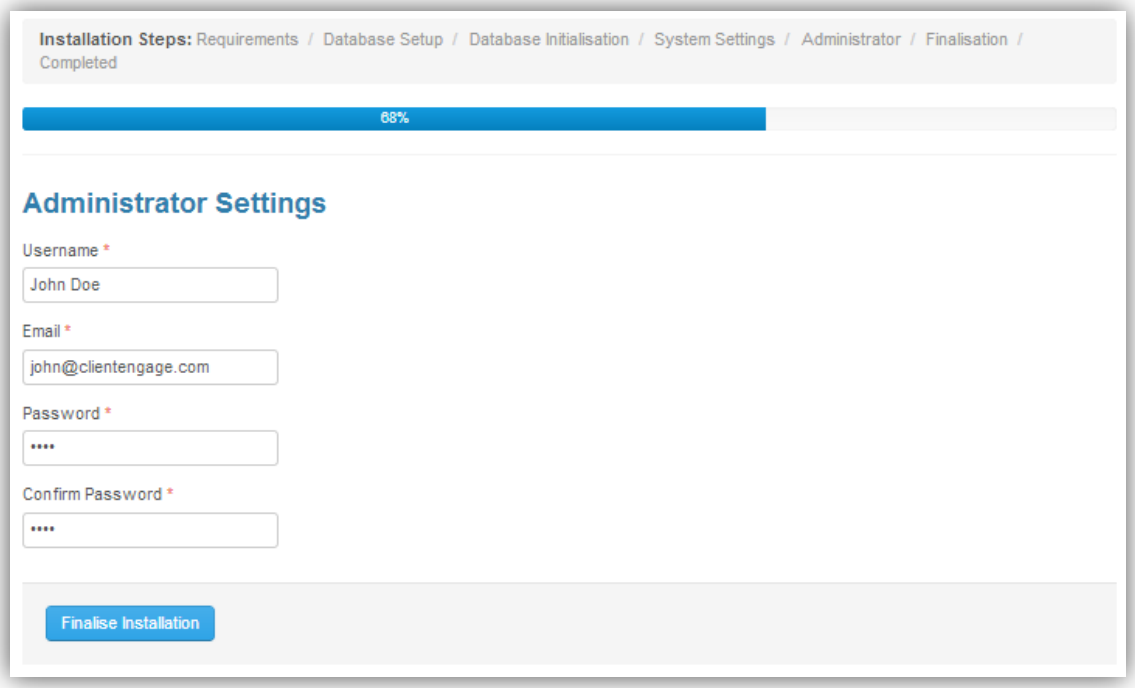

ClientEngage
Installation Steps: Requirements / Database Setup / Database Initialisation / System Settings / Administrator / Finalisation / Completed
34%
You have successfully configured the database connection. Please click "Initialise Database" to create all necessary database tables.
Initialise Database

Click “Initialise Database” and wait for the process to finish.

Now, select your language, type your email settings and click “Continue”:

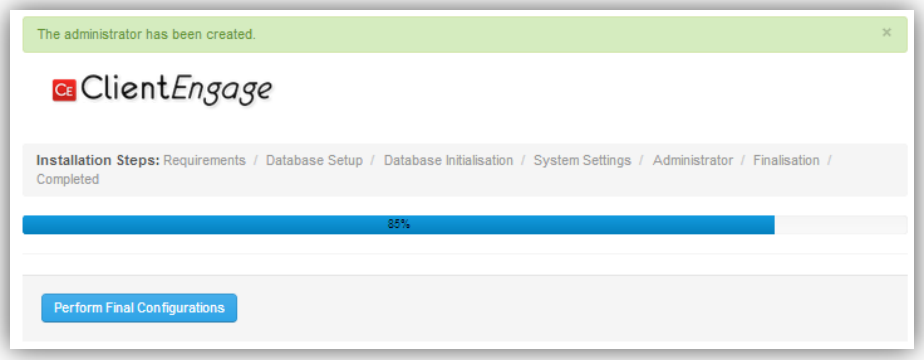

The database has been successfully initialised.
ClientEngage
Installation Steps: Requirements / Database Setup / Database Initialisation / System Settings / Administrator / Finalisation / Completed
51%
System Settings
System Language
English (British)
Continue

You can now create your administrative user in the following form:

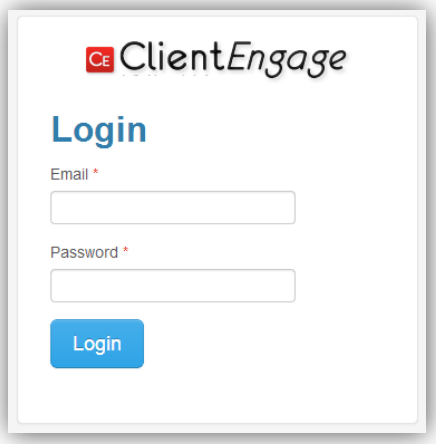


Please ensure that you remember the email address and password you choose – you will need these to log into the system. Click "Finalise Installation" when you are done".

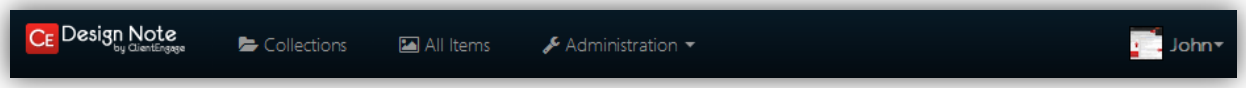
You have now reached the final step of the installation process:


The administrator has been created.
ClientEngage
Installation Steps: Requirements / Database Setup / Database Initialisation / System Settings / Administrator / Finalisation / Completed
85%
Perform Final Configurations

Click “Perform Final Configurations” and wait for the process to finish. If the installation process was successful, you will be automatically redirected to your log-in screen. The login will always be accessible at http://chat.example.com/login/. Please type in the email address and password of the administrator you created during the installation process:



After logging-in successfully, you will see the administration panel and you can begin using ClientEngage Design Note to gather invaluable feedback from your visitors:



The first thing you should do is to navigate to “Administration → Configuration” in order to perform any necessary configurations before you start using ClientEngage Design Note.

4.5. Changes to Database Credentials

If you change your database login information, then you have to reflect these changes in the following file: “app/Config/database.php”.

5. Using ClientEngage Design Note

5.1. System Configuration

The main system configuration contains three settings: one for your default timezone and one for selecting the system's interface language. If you wish to translate ClientEngage Design Note into a different language, then please refer to section 6.1.

Moreover, you can perform your email configuration: you can choose from PHP's own mail() function and your own SMTP server for the system's email delivery mechanism.

5.2. Using the System: Getting Client Feedback

To generate feedback, you first need to create a collection.

Go to "Collections" and select "Add Collection". You can now enter a title and description. If you enter an access code, a client who knows the code can access **all** items within that collection. If you select "Enable Browsing", clients can jump from an item back to the overview. If you select the "Enable Browsing" function, you should only share the URL to the collection, not individual items. Otherwise your clients have to constantly re-enter collection & item access codes.

That being said: unless you work on top-secret accounts, you don't actually have to make use of the access code feature.

Afterwards, you can add any number of items to the collection. Go to "Items" and select "Add Item" and type the item's title and description and select the image file.

You can also create an access code. Items without an access code can be viewed by anyone who knows the URL.

Now, simply share the item's "Annotate" URL or the "Discuss" URL – depending on what you want to do. You can also share the URL to the item's collection. A client who knows a collection's access code can access **all** items within that collection.

To view your feedback, simply go to "Items" and "View" the respective item. You can see a list of all submitted feedback. Moreover, you can navigate to the respective discussion pages to talk to your clients (however, clients will not receive activity notifications. Hence you have to ask them to regularly come back to the discussion page).

6. Extending ClientEngage Design Note

6.1. Translating ClientEngage Design Note

You can easily translate ClientEngage Design Note into your own language by performing the following steps:

1. Create a folder with your language's code within "app/Locale/yourcode/"; you need to use the three-letter locale-code which you can find here (the code on the left)
2. Next, create the following subfolder: „app/Locale/yourcode/LC_MESSAGES/"
3. Open Poedit (www.poedit.net), select "File -> New catalog from POT file" and select "app/Locale/default.pot"
4. You can now translate all the strings used within the application and safe the file as "app/Locale/yourcode/LC_MESSAGES/default.po" repeat the same process for "cake.po" to translate time-specific strings
5. Repeat the same process by opening "cake.pot" and saving it next to your newly created "default.po" (you should have cake.po and default.po in your LC_MESSAGES directory)
6. Now open "app/Lib/GlobalClasses.php" and add your language around line 200, your language code is the index of the array item and the display-name is the value
7. Finally, please go to "Administration → Configuration" and select your language

I am always looking for user-contributed translations of ClientEngage Design Note. If you have translated the system into a language that is not yet part of the default languages, please consider sharing your translation with me. To reciprocate, I can offer you an attribution with backlink on the item page. Please get in touch via email: contact@clientengage.com

6.2. Customising the CSS Styles

If you wish to customise the CSS styles, please use the file "app/webroot/css/custom.css". This file will never be overwritten by any future update procedures. You can adapt the look and feel of your site by overriding Design Note's own CSS classes.

6.3. Customising HTML-Templates

Are there certain areas of the system which you would like to change in terms of their layout? You can easily adapt any visual aspect of the system by amending the template files. You can find individual "pages" in "app/View/AREANAME/PAGENAME" and the main layouts in "app/View/Layouts/" (default.ctp and public.ctp).

However, please be advised that any custom changes to the default layout will be lost if you decide to upgrade ClientEngage Design Note in the future. Therefore, it is advisable that you keep a list of all your custom changes to enable you to merge them back into the system after updating. Furthermore, there are free merge-utilities which may be able to help you in this respect.

7. Helpful Resources

If your system fulfils the minimum requirements, then you should have no problems in running ClientEngage Design Note. However, some developers may wish to adapt ClientEngage Design Note. There are some helpful resources that may help you accomplish this.

First and foremost, you should have good knowledge of general web development practices and, in particular, PHP 5. You may also wish to check-out the documentation of the amazing PHP Framework on basis of which ClientEngage Design Note is built: CakePHP.

The best place to learn about CakePHP is to visit http://www.cakephp.org and, in particular, the documentation under http://book.cakephp.org.

Please note that, currently, ClientEngage Design Note uses CakePHP 2.3.2 – this is subject to change with future revisions and additions to Design Note.

8. When Encountering Problems

If you encounter any problems whilst using ClientEngage Design Note, please first ensure the following:

1. Did you **recursively** set your write permissions for the respective folders that need it?
2. Does your system fulfil the minimum requirements?
3. If you receive upload-errors, what is your server settings' max-upload and post size?
4. Are you using GoDaddy as your webhost? Then please follow these instructions.
5. If your system *does* fulfil the minimum requirements, then please do get in touch through the CodeCanyon author profile (i.e. the e-mail form). You will receive a response as soon as possible to propose a solution.
6. Furthermore, please also keep an eye on Design Note's FAQ section on CodeCanyon – this is where common questions will be answered over time.

9. Feedback is Welcome

Do you have any feedback, praise or a particular problem? Do you have great ideas for future additions to ClientEngage Design Note? Then please do send these through ClientEngage's CodeCanyon profile or email these to contact@clientengage.com. I am always on the lookout for clients' input to make future offerings even better. After all – I want all my clients to be delighted with their purchases.

10. Third Party Components: Credits

This application was made possible with the help of various third party components. For a list of attributions, please see below.

CakePHP

This application was built using the amazing CakePHP framework.

License: MIT License

Path: `lib\Cake\LICENSE.txt`

Website: http://www.cakephp.org

Twitter Bootstrap

Many of this application's visual aspects were made possible by using the Twitter Bootstrap framework.

License: Apache License v2.0

Path: `app\webroot\css\bootstrap\LICENSE`

Website: http://twitter.github.com/bootstrap/

Metro Bootstrap

Metro Bootstrap provides the basis of the Twitter Bootstrap adaptations.

License: Apache License v2.0

Path: `app\webroot\css\metro-bootstrap\LICENSE`

Website: http://talkslab.github.io/metro-bootstrap/

Font Awesome

Icons are powered by the awesome Font Awesome.

License: MIT License (CSS and LESS files) | SIL OFL 1.1 (FONTS)

Path: `app\webroot\css\fontawesome\LICENSE`

Website: http://fortawesome.github.io/Font-Awesome/

famfamfam Icons

A subset of the amazingly brilliant famfamfam icon set was included in this application.

License: Creative Commons Attribution 2.5 License

Path: `app\webroot\img\icons\readme.txt`

Website: http://www.famfamfam.com/

jQuery

Many aspects of the user interaction logic use jQuery.

License: MIT License

Path: `app\webroot\js\jquery\MIT-LICENSE.txt`

Website: http://jquery.com/

ZURB JavaScript Annotation Plugin

Annotation features were developed based on ZURB's JavaScript Annotation Plugin.

License: MIT License

Path: `app\webroot\js\annotate\MIT-LICENSE.txt`

Website: http://zurb.com/playground/javascript-annotation-plugin

CakePHP Upload Plugin

This application uses the Upload Plugin for CakePHP to manage the file uploading.

License: MIT License

Path: `app\Plugin\Upload\README.markdown`

Website: https://github.com/josegonzalez/upload/

CakePHP Migrations Plugin

This application's update procedure is made possible by using the CakePHP Migrations Plugin.

License: MIT License

Path: `app\Plugin\Migrations\readme.txt`

Website: https://github.com/CakeDC/migrations/

TinyMCE

The fantastic TinyMCE editor was used to allow users to format comments.

License: LGPL License

Path: `app\webroot\js\tiny_mce\license.txt`

Website: http://www.tinymce.com/